

Using Deliverable Management Module

GENERAL INFORMATION

The Integrated Capital Investment Support System Deliverable Management Module (ICISS DMM) is a module within the ICISS application. The ICISS DMM allows the Contract Administration Team to manage project documents. To make a more efficient workflow system, this module also allows Contractors to enter, edit, and track task orders, work requests, deliverable delays, and cancellation memos.

To access the ICISS DMM, users must first go through the Office Of Administration's eCASH Navigator web site, which provides a window through which to access Administration applications. To access eCASH from the HUDWeb homepage (hudweb.hud.gov), find the TOPICS heading from the left column and click the "hq offices" link. Next, click the link for the first choice in the list, "Administration (ADMIN)", which will bring you to the Administration homepage. From the left column, under ADMIN TOPICS, click on "work on-line". In the list that results, the "eCASH Navigator" link will be available. Click on this link.

Initially, you must install the eCASH Navigator. You will only need to install the eCASH Navigator once. Please follow the instructions provided on the screen to install the eCASH Navigator.

Once you have entered the eCASH Navigator, you can search for ICISS by the following criteria: Business Function, Service Area, or System Acronym. The easiest search is by System Acronym. Click the "System Acronym" button (or link). Scroll down through the list until you locate ICISS. Select the ICISS link and the ICISS main login page will open.

NOTE: To access the ICISS DMM, you must have a User ID and Password. To obtain these, please contact your HUD Project Leader.

The user ID and password are not case sensitive. Once you have entered the ID and password, click "Logon". The ICISS DMM page will open and automatically launch the Lotus Notes database for the ICISS DMM. The system will prompt you for your Notes ID password. Enter the password and click "OK". The system opens in the DMM Request Database.

For user assistance, please contact the User Assistance Branch (UAB) at (202) 708-3300 and a systems administrator will be contacted to further assist you.

The ICISS DMM contains three databases: Profile, Request and Attachment. The Profile database contains contract, task order, and work request general information, and defines the initial workflow. The Request database is where contractors review work requests and create deliverables, deliverable delays, and cancellation memos. The Attachment database is where the documents and deliverables are stored.

The DMM has a graphical navigator that enables a user to select and view categories of documents. The navigator is on the left side of the screen. The documents, sorted by the selected category, display in a view pane on the right side.

WORK REQUEST (FOR CONTRACTORS)

View

Documents can be sorted **By Task Order**, **By Status**, and **By Date Entered**. Links are also provided to the **Deliverable Plan** report and the **Deleted** document trash bin.

ICISS
Deliverable Management

By Task Order










By Status

By Date Entered

Deliverable Plan

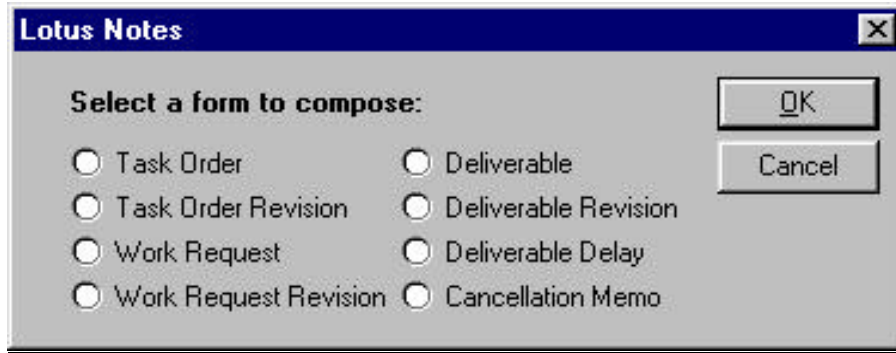
Deleted

The default view of the Request database is **By Task Order**, which is shown below:

| | | |
|--|---|-----------------------|
| ▼ Contract ABC (ATS) | | |
| ▼ Task Order 009 | | |
| ▼ Task Order | | |
|  Rev. 0 | [OPSD Task Order] | Complete |
|  Rev. 1 | [OPSD Task Order] | In Process |
| ▼ Work Request 076 | | |
|  Rev. 0 | [Oversight & Policy Support Division Development and | Awaiting PM Review |
|  Rev. 0 | [Oversight & Policy Support Division Development and | In Process |
|  Rev. 0 | [Oversight & Policy Support Division Development and | In Process |
|  Deliverable Rev. 0 | [Training2] | Awaiting GTM Approval |
|  Deliverable Rev. 0 | [Training4] | Awaiting GTM Approval |
|  Deliverable Rev. 0 | [Training5] | Awaiting GTM Approval |
|  Deliverable Rev. 0 | [Training6] | Awaiting GTM Approval |

Create Work Request (For HUD GTM only)

Click  to display the following dialog box:




Click the radio button that is associated to the work request to be created, then click **OK**. A description for work request follows.

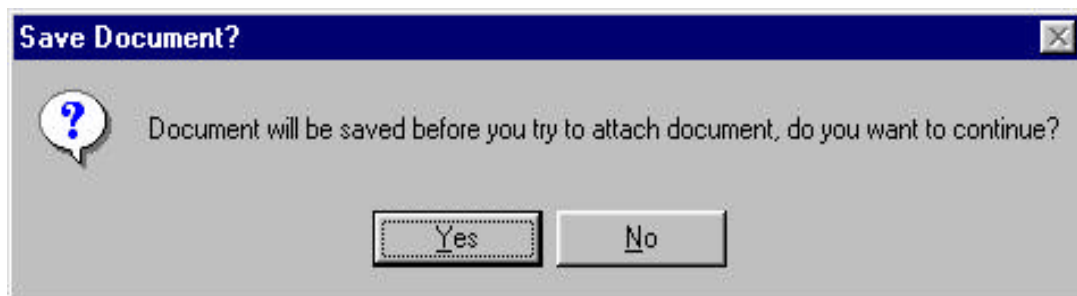
| Form Name | Description |
|--------------------------|--|
| 1. Work Request | Select a task order request to create a work request. |
| 2. Work Request Revision | If the original work request is rejected by one of the approvers, or if a user wants to generate an updated work request based on the original, select the original work request, then create a revision. A revision will inherit the values from the original. Multiple revisions can be created. |

Attach Document

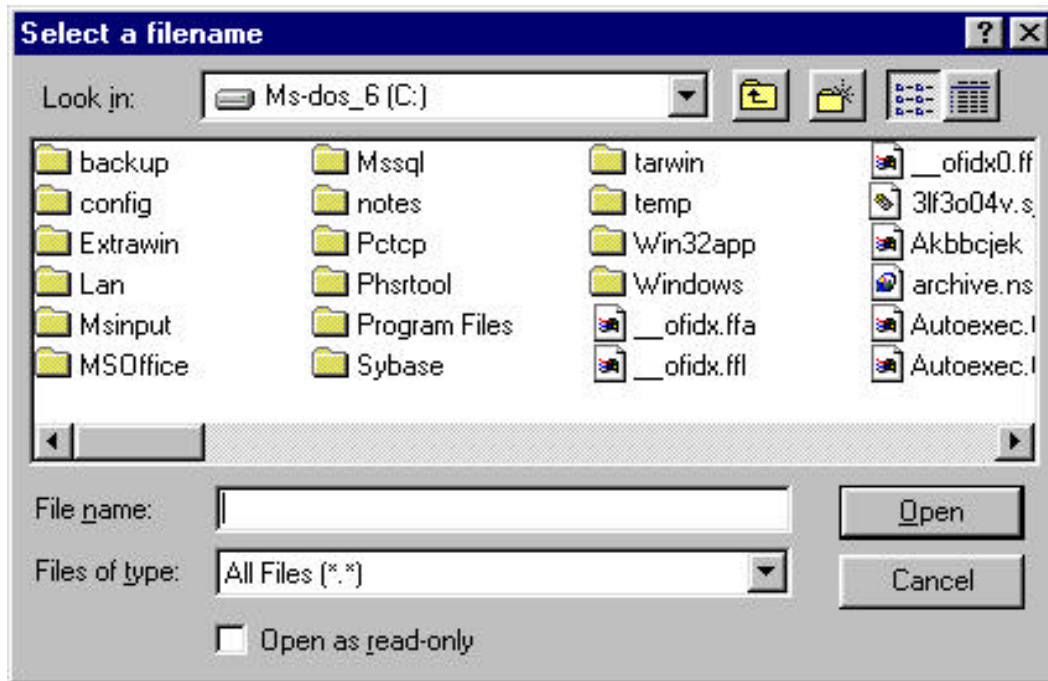
Every request form has several rich text fields in which a user can attach MS Word, MS Excel, etc., documents.

| Form Name | Rich Text Fields |
|--------------|--|
| Work Request | <ul style="list-style-type: none"> • Work Request • Government Cost • Workplan Estimate • Other • Special Requirement |

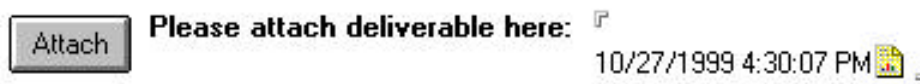
Every rich text field has an  button on the left side. When the button is clicked, the following dialog box will display:



Click **No** to cancel the request. Click **Yes** to continue, and the following dialog box will display:



Select the file to be attached and click **Open**. The document will be attached in the DMM Attachment database and an attachment doclink, with the file creation date/time, will display to the right of the rich text field.



Click the doclink to open the attachment. This will open the attached document from the DMM Attachment database.



History:

Contract: 2
Task Order: 76
Created: 10/27/99 04:24 PM by Student User21
Revised:

Work Request

| Section/Field | Description |
|---------------|--|
| 1. Status | <p>The field value is automatically computed to indicate the document approval status and will contain one of the following values:</p> <ul style="list-style-type: none"> • In Process • Awaiting PM Review • Rejected by PM • Awaiting GTM Approval • Rejected by GTM |

| | |
|-------------------------------------|---|
| | <ul style="list-style-type: none"> • Awaiting GTR Approval • Rejected by GTR • Awaiting RMS Signoff • Rejected by RMS • Awaiting PM Signoff • Rejected by PM Final Approval • Awaiting GTR Signoff • Rejected by GTR Final Approval • Complete |
| 2. Work Request Information Section | The value for each field is obtained from the DMM Profile database, based on the contract you are working for and the work request you want to create. There are also five rich text fields on the request form (see Attach Document, above). |
| 3. Workflow Information Section | This section contains the approvers for the request. The default value for each field is obtained from the DMM Profile database, based on the contract you are working for and the work request you want to create. Other approvers can be specified. |

Security

| Role | Rights |
|----------------|--|
| 1. Contractors | Contractors can read and create their contract-related documents only. For example, if you are working for Advanced Technology Systems (ATS) contract 2, you can create contract 2 deliverables, deliverable delays and cancellation memos. You can not read other contract-related documents. |
| 2. Approvers: | Approvers can approve requests that specify their name (GTM, GTR, Contract Project Manager, or RMS). |
| 3. SuperUser: | A SuperUser is the most powerful role. SuperUsers can see all contract-related documents; however, they will not be able to create requests unless their name is specified in a contract profile document in the DMM Profile database. |

Workflow

| Form Name | Workflow |
|--------------------------|--|
| 1. Work Request | Requester → PM Review → Multiple GTM Approval → GTR Review → RMS Approval → PM Approval → GTR Approval |
| 2. Work Request Revision | Requester → PM Review → Multiple GTM Approval → GTR Review → RMS Approval → PM Approval → GTR Approval |

DELIVERABLE (FOR CONTRACTORS)

View

Documents can be sorted **By Task Order**, **By Status**, and **By Date Entered**. Links are also provided to the **Deliverable Plan** report and the **Deleted** document trash bin.

ICISS
Deliverable Management

By Task Order

By Status

By Date Entered

Deliverable Plan

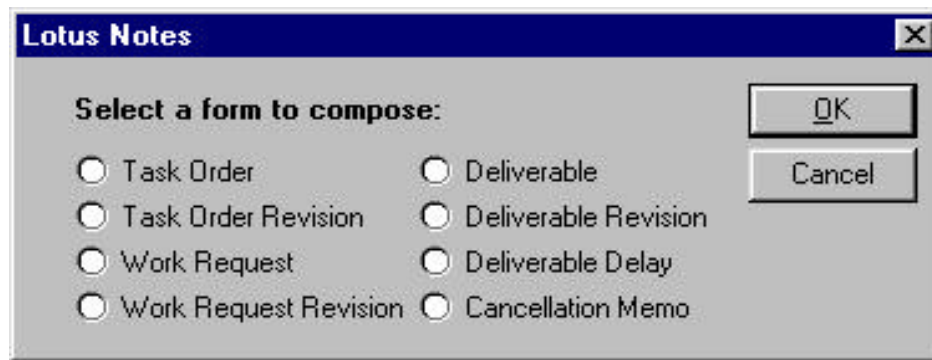
Deleted

The default view of the Request database is **By Task Order**, which is shown below:

| | | | | Description | Status |
|--|--|--|--|---|-----------------------|
| | | | | ▼ C-OPC-18462 (ATS) | |
| | | | | ▼ Task Order 45 | |
| | | | | ▼ Task Order | |
| | | | | Rev. 0 [Lotus Notes] | Complete |
| | | | | Rev. 0 [Lotus Notes] | In Process |
| | | | | ▼ Task Order 76 | |
| | | | | ▼ Work Request 45 | |
| | | | | Rev. 0 [Mainframe] | In Process |
| | | | | Deliverable Rev. 0 [Test] | Rejected by GTM |
| | | | | Deliverable Rev. 0 [Domino Server Upgrade] | Awaiting GTR Approval |
| | | | | ==>Delay [test] | In Process |
| | | | | ==>Cancelled [The date has been rescheduled.] | In Process |
| | | | | Deliverable Rev. 0 [Y2K Certification] | Complete |
| | | | | Deliverable Rev. 0 [Internet training] | Awaiting GTM Approval |
| | | | | Deliverable Rev. 0 [Internet Seminar] | Awaiting GTR Approval |

Create Deliverable

Click  to display the following dialog box:




Click the radio button that is associated to the deliverable to be created, then click **OK**. A description of each form follows.

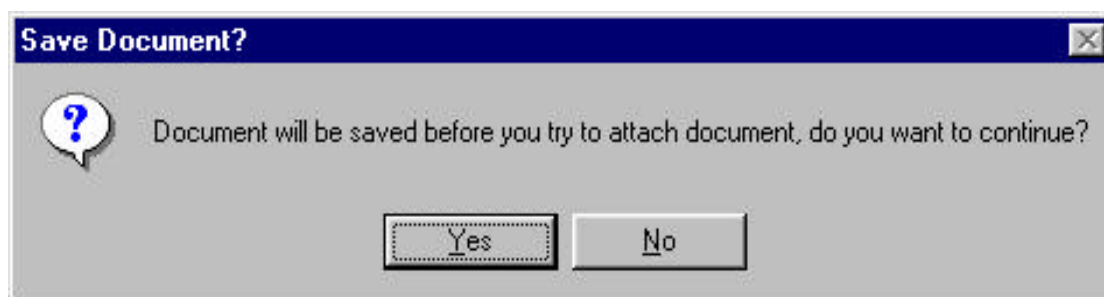
| Form Name | Description |
|-------------------------|--|
| 1. Deliverable | Select either task order (task order revision) or work request (work request revision) to create a new deliverable. |
| 2. Deliverable Revision | If the original deliverable is rejected by one of the approvers or if a user wants to generate an updated deliverable based on the original, select the original deliverable and create a revision. A revision will inherit the values from the original. Multiple revisions can be created. |
| 3. Deliverable Delay | To change the deliverable date of a deliverable, select the deliverable and create a delay. |
| 4. Cancellation Memo | To cancel a deliverable, select the deliverable and create a cancellation memo. |

Attach Document

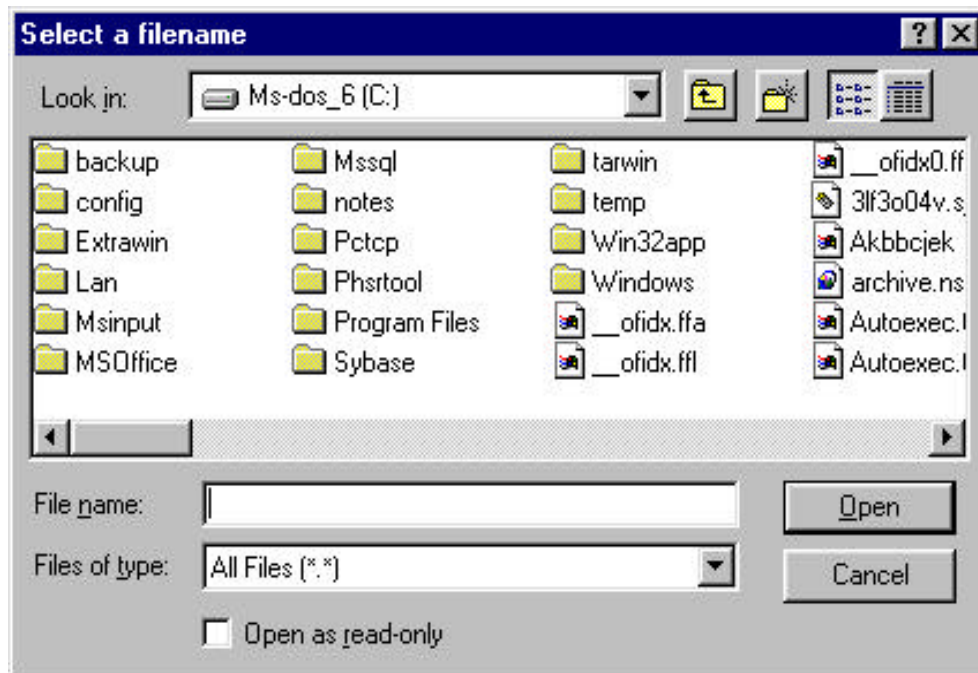
Every request form has several rich text fields in which a user can attach MS Word, MS Excel, etc., documents.

| Form Name | Rich Text Fields |
|----------------------|---|
| 1. Deliverable | <ul style="list-style-type: none"> Deliverable Assignment |
| 2. Deliverable Delay | <ul style="list-style-type: none"> Attach Document |
| 3. Cancellation Memo | <ul style="list-style-type: none"> Attach Document |

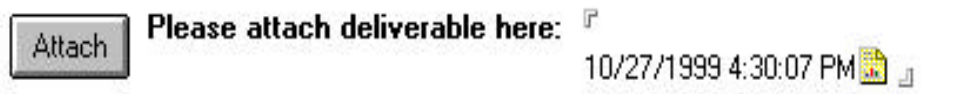
Every rich text field has an  button on the left side. When the button is clicked, the following dialog box will display:



Click **No** to cancel the request. Click **Yes** to continue, and the following dialog box will display:



Select the file to be attached and click **Open**. The document will be attached in the DMM Attachment database and an attachment doclink, with the file creation date/time, will display to the right of the rich text field.




Click the doclink to open the attachment. This will open the attached document from the DMM Attachment database.



History:


Contract: 2
Task Order: 76
Created: 10/27/99 04:24 PM by Student User21
Revised:

Deliverable Request


A Deliverable Request is required if a  displays to the left of the field.

| Section/Field | Description |
|---------------|---|
| 1. Status | The field value is automatically computed to indicate the document approval |

| | |
|-----------------------------|---|
| | <p>status. Valid values are:</p> <ul style="list-style-type: none"> • In Process • Awaiting GTM Approval • Rejected by GTM • Awaiting GTR Approval • Rejected by GTR Final Approval |
| 2. Deliverable Name | Enter the deliverable description. This field is required and has default focus when a deliverable request is first composed. |
| 3. Contract Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 4. Contract Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 5. Task Order Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 6. Task Order Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 7. Work Request Number | If a task order is selected to create a deliverable, this field will be blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 8. Work Request Name | If a task order is selected to create a deliverable, this field will be left blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 9. Contract Project Manager | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 10. Point of Contact | This is the contact information. The value of each field is inherited from the task order or work request selected when a deliverable was composed. |
| 11. Job Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 12. Deliverable Due Date: | Enter the deliverable due date. This field corresponds to the Date Scheduled field. If the Deliverable Due Date field is left blank, the Date Scheduled field appears unscheduled. |
| 13. Period of Performance | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 14. Status | <ul style="list-style-type: none"> • IVn - Initial Version n • ITn - Intermediate Version n • Fn - Final Version n |
| 15. Date Received | Enter the date the deliverable was received. |
| 16. Date Scheduled | This field value is automatically computed. It corresponds to the Deliverable Due Date field. |
| 17. Workflow Information | This is the section where approvers are specified for the request. The value of each field is inherited from the task order or work request selected when a deliverable is composed. The default values can be changed. |
| 18. Evaluation Type | <ul style="list-style-type: none"> • R - Review • T - Test • E - Evaluation • I - Inspection |
| 19. Evaluation Action | <ul style="list-style-type: none"> • A - Approved • AC - Approved with changes, no re-evaluation required • AP - Approved provisionally until a more detailed analysis can be made • R - Rejected, re-evaluation required |

Click . A CPA form will be generated in MS Word and printed out on the default network printer.

Deliverable Delay Request

A Deliverable Delay Request is required when a  displays to the left of the field.

| Section/Field | Description |
|--------------------------|---|
| 1. Status | The field value is automatically computed to indicate the document approval status. Valid values are: <ul style="list-style-type: none"> • In Process • Awaiting GTM Approval • Rejected by GTM • Awaiting GTR Approval • Rejected by GTR Final Approval |
| 2. Contract Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 3. Contract Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 4. Task Order Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 5. Task Order Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 6. Work Request Number | If a task order is selected to create a deliverable, this field will be blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 7. Work Request Name | If a task order is selected to create a deliverable, this field will be blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 8. Deliverable Name | The field value is inherited from the deliverable selected when the delay is composed. |
| 9. Explanation of Delay | Explain why the deliverable needs to be delayed. |
| 10. Old Due Date | The field value is inherited from the Due Date field from the deliverable selected when the delay is composed. |
| 11. New Due Date | This is the new date which will replace the old due date. |
| 12. Workflow Information | This is the section where approvers are specified for the request. The value of each field is inherited from the deliverable selected when the deliverable delay is composed. The default values can be changed. |

Cancellation Memo Request

A Cancellation Memo Request is required when a  displays on the left side of the field.

| Section/Field | Description |
|--------------------|---|
| 1. Status | The field value is automatically computed to indicate the document approval status. Valid values are: <ul style="list-style-type: none"> • In Process • Awaiting GTM Approval • Rejected by GTM • Awaiting GTR Approval • Rejected by GTR Final Approval |
| 2. Contract Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |

| | |
|--------------------------------|--|
| 3. Contract Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 4. Task Order Number | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 5. Task Order Name | The field value is inherited from the task order or work request selected when a deliverable is composed. |
| 6. Work Request Number | If a task order is selected to create a deliverable, this field will be left blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 7. Work Request Name | If a task order is selected to create a deliverable, this field will be left blank. If a work request is selected to create a deliverable, the field value will be inherited from the work request. |
| 8. Deliverable Name | The field value is inherited from the deliverable selected when the cancellation memo is composed. |
| 9. Explanation of Cancellation | Explain why the deliverable needs to be cancelled. |
| 10. Workflow Information | This is the section where approvers are specified for the request. The value of each field is inherited from the deliverable selected when the cancellation memo is composed. The default values can be changed. |

Security

| Role | Rights |
|----------------|---|
| 1. Contractors | Contractors can read and create their contract-related documents only. For example, if you are working for Advanced Technology Systems (ATS) contract 2, you can create contract 2 deliverables, deliverable delays, and cancellation memos. You can not read other contract-related documents. |
| 2. Approvers: | Approvers can approve requests that specify their name (GTM, GTR, Contract Project Manager, or RMS). |
| 3. SuperUser: | A SuperUser is the most powerful role. SuperUsers can see all contract-related documents; however, they will not be able to create requests unless their name is specified in a contract profile document in the DMM Profile database. |

Workflow

| Form Name | Workflow |
|-------------------------|--|
| 1. Deliverable | Requester → Multiple GTM Approval → GTR Approval |
| 2. Deliverable Revision | Requester → Multiple GTM Approval → GTR Approval |
| 3. Deliverable Delay | Requester → Multiple GTM Approval → GTR Approval |
| 4. Cancellation Memo | Requester → Multiple GTM Approval → GTR Approval |